

# Virtual Meeting Norms

- Position your camera properly & please keep on
- Please MUTE microphones when not speaking
- Limit distractions
- Avoid multi-tasking
- Be engaged & participate

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at ERSKIN



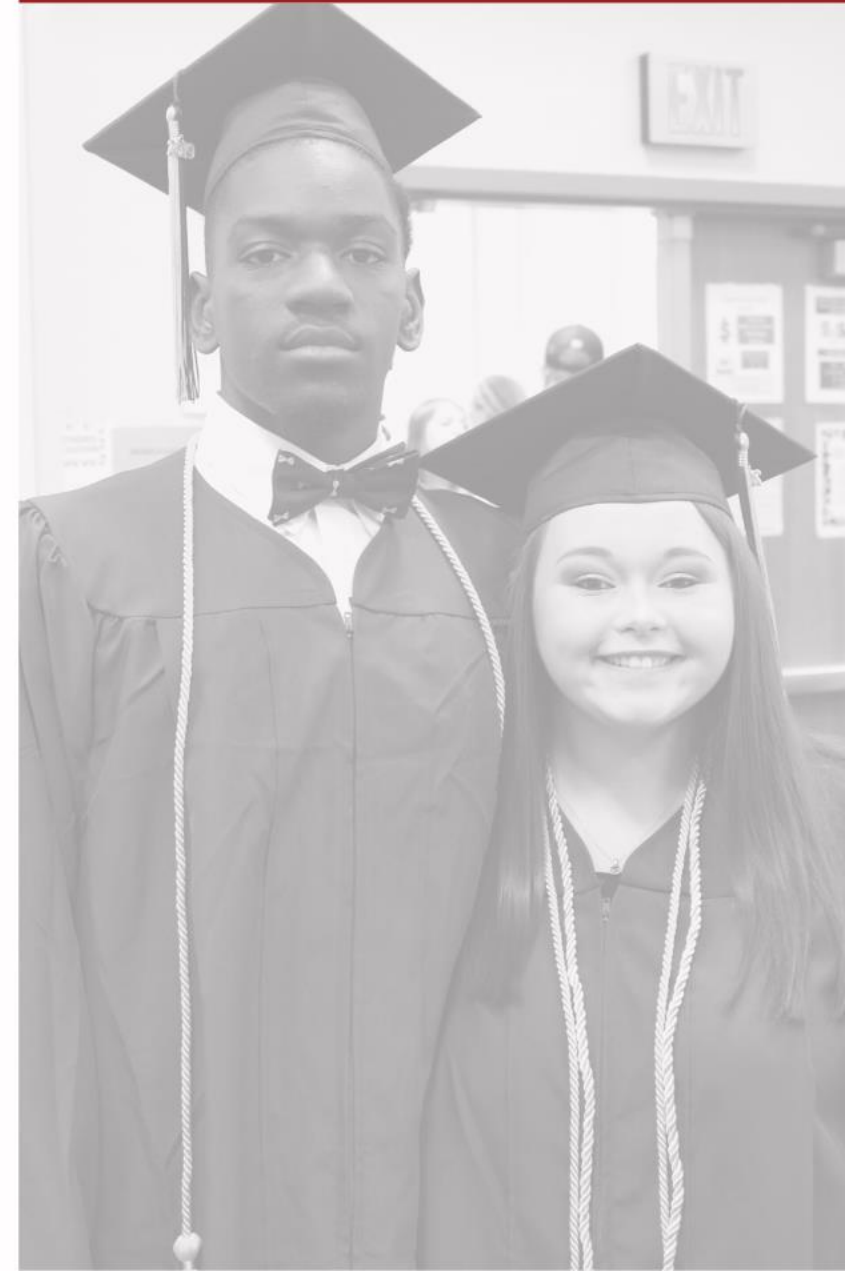
The Charter Institute at

# Erskine

Federal Programs Training  
September 10, 2020  
10:00 a.m. – 12:00 p.m.

CREATIVE MINDS  
INNOVATIVE SCHOOLS  
EFFECTIVE RESULTS

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# Meeting Agenda

- Updates
- Federal Funds Allocations
- Plan Submission Process
- Monthly Reimbursements
- Federal Fund Employees
- Title II Program
- Title I Program



**Sarah Shealy**  
Compliance Coordinator



**Ashley Sturkie**  
Fiscal Coordinator



**Haley Perez**  
Executive Director of Federal Programs

# Federal Programs Team

# Updates – FY 21 Funds

- IDEA allocations have been sent
  - Plans are due this Friday – 09/11/2020
- Title I eligibility and allocations pending 5<sup>th</sup> day count report
- Title II allocations pending 5<sup>th</sup> day count report



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# Updates – CARES Act Funds

- Amendments due via LWS on 09/15/2020
  - Date differs for Brashier, Connections, and Lowcountry
- Expenditures must match the time period selected
  - On-going expenses should have the time period the expense will begin selected
  - If time period differs from approved plan, the school will either need to complete an amendment or submit a statement explaining why time period differs
    - This is an SCDE requirement

# Updates – LEAP Funds

- Formstack submissions have been reviewed and feedback has been sent to all applicable schools
- Smart Fusion budgets have been sent yesterday/today
  - If your school has not received a budget, please ensure you have responded to the email requesting more information



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# Updates – Support Survey

Please complete the linked survey to identify areas you would like more assistance, training, or resources on.

<https://erskinecharters.formstack.com/forms/federalprogramssupportsept20>

This link will be posted in the chat box.



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# Federal Fund Allocations

**Ashley Sturkie**  
Fiscal Coordinator

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# How are federal funds allocated?

## Funds Allocated to Schools

- Title I
  - Per pupil amount based on 5<sup>th</sup> day count (*F/R/P lunch status only*)
- Title II
  - Amount based on 5<sup>th</sup> day count
- IDEA
  - Per pupil amount based on prior year child count

## Funds Allocated as District Set-Asides

- Title III
  - ESOL Certification Cohort
- Title IV

# 5<sup>th</sup> Day Count

- The 5<sup>th</sup> day count is the official data pull that determines eligibility and allocation of Federal funds.
- The 5<sup>th</sup> day pull must contain all the free and reduced lunch information you have collected to determine your poverty rate, as well as District of Residence information.
- All schools should collect lunch forms from students, even virtual schools and schools that do not offer meals.
- These forms must be updated **annually**.
- Schools must work with their PowerSchool coordinators to ensure all information is entered

# 5<sup>th</sup> Day Monitoring

## How will the Institute monitor?

- The Institute Federal Programs department will audit lunch forms and proof of residency.
  - *Schools will be asked to provide copies of randomly selected students each year.*
- Schools may randomly select a few lunch forms and verify them with documentation provided by the parent to ensure compliance.

# District of Residence

- All schools should collect District of Residence documentation for all students.  
*It has to be collected each year.*
- Proof of address requirements are available on the website.



1201 Main Street, Suite 300, Columbia, SC 29201

## Proof of Residence Requirements

Upon initial enrollment in a school within Charter Institute at Erskine, a student or parent must produce at a minimum one document reflecting the correct residential street address.

Post office boxes, private mail box addresses or commercial establishment addresses are insufficient.

All documentation presented must show the date, property owner's name or parent/guardian's name.

Acceptable documentation includes:

- home telephone or cellular telephone bill;
- electric bill;
- rent receipt with the name of the tenant and landlord and contact information for all parties;
- lease agreement with name of tenant and landlord and contact information for all parties (valid only through the expiration date indicated on the agreement. Upon expiration, parents must present a copy of the renewed or new agreement to the school office.);
- mortgage;
- home purchase contract including specific closing date, with copy of the deed to be provided within 30 days of closing date;
- valid State of South Carolina driver's license;
- valid State of South Carolina identification card;
- automobile insurance policy;
- credit card statement;
- United States Postal Service confirmation of address change;
- evidence of correspondence, including a stamped, addressed, postmarked envelope delivered to the home address; or
- Declaration of Domicile form from the County Records Department.

# Allocation Memos

- Allocation memos are sent for all grants
- There are sent via email and posted in LWS



Office of Federal Programs

1201 Main Street, Suite 300, Columbia, SC 29201

TO: School Special Education Coordinators  
School Leaders  
School Finance Officers

FROM: Ashley Sturkie, Fiscal Coordinator

Date: September 2, 2020

RE: FY 21 IDEA Allocation (Fund 203)

The purpose of this memorandum is to notify you that the Charter Institute at Erskine has been notified of its Individuals with Disabilities Education Act (IDEA) allocation from the South Carolina Department of Education. In return, the Institute has made allocations to each of its schools in a manner that is constant with IDEA regulation.

Please see your school's allocation and student counts used for calculations. These allocations were based on a per-pupil amount (\$1040.79) multiplied by the child count numbers collected for the schools via the 2019 child count.

Please complete the linked ["IDEA Plan Submission"](#) by listing the requested activities you project to fund with the school allocation, provide sufficient narrative description for requests as notated within the budget request form, specify the appropriate budget coding (object and function), and have the form signed by both the school leader and school finance officer.

Please submit the signed, completed plan to the Institute via the [linked Formstack](#) by **September 11, 2020 at 5:00 p.m.**

The period of availability is July 1, 2020 – July 31, 2021. Upon plan approval, expenses are due in Smart Fusion the *2<sup>nd</sup> Friday of each month*. The final deadline for expenses from July 1, 2021-July 31, 2021 is *Friday, August 6, at 5:00 p.m.*

These IDEA funds are to be spent on the provision of special education and/or related services to students who are identified as having a disability under IDEA.

#### IDEA Allocation for 2020-2021 (Fund 203)

School Name	Child Count Numbers	FY 21 Allocation
[REDACTED]	[REDACTED]	[REDACTED]

Sincerely,

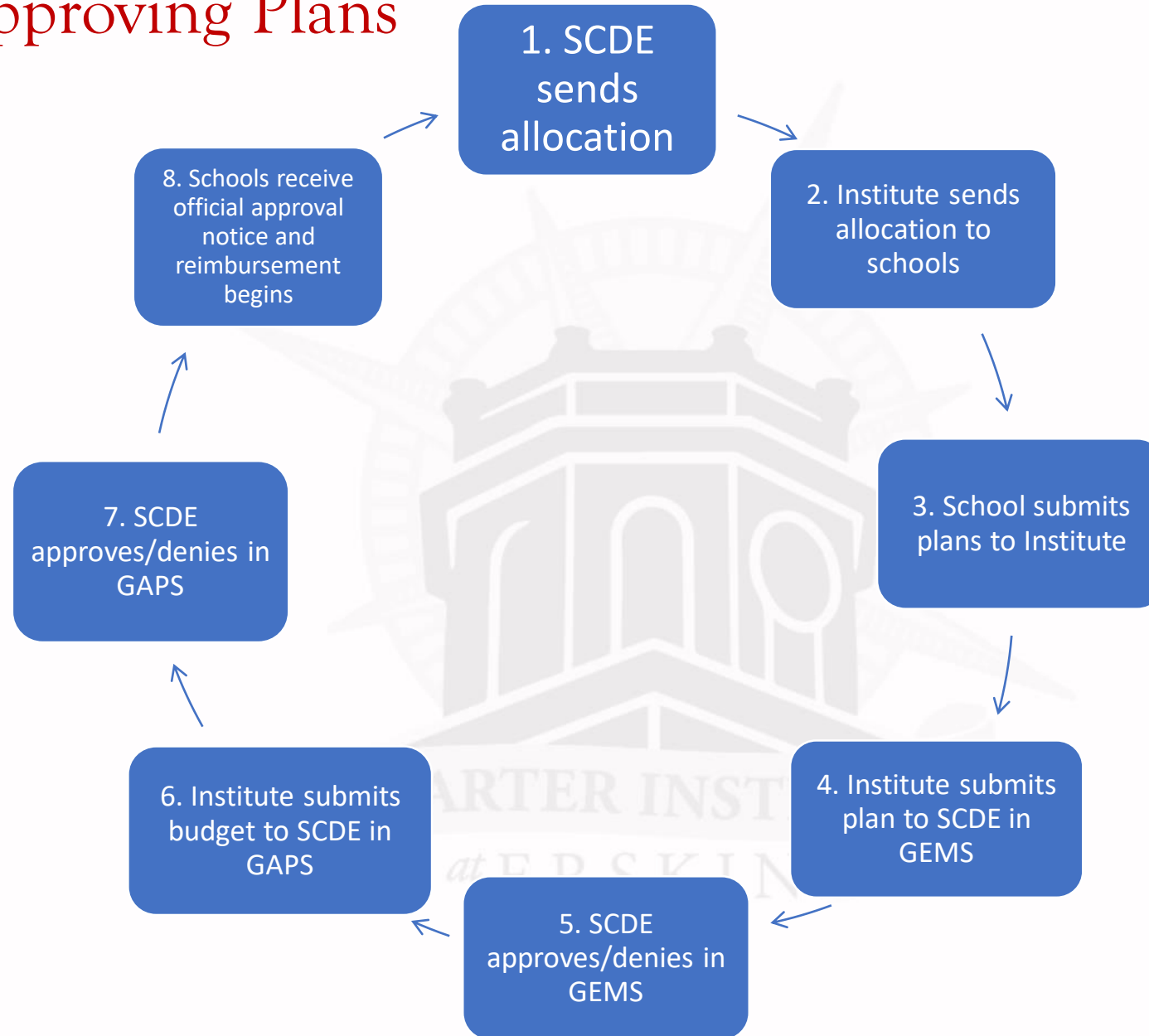
**Ashley Sturkie**  
Fiscal Coordinator  
The Charter Institute at Erskine

# Plan Submissions Process

**Ashley Sturkie**  
Fiscal Coordinator

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*at* ERSKINE

# Process of Approving Plans





# Plan Submissions

- All plans are submitted via Formstack
- The Formstack collects information on function/object codes, activity narrative, and amount.
- **We submit plans to SCDE as a district, so timely responses are necessary or the process for approval is potentially delayed for all schools.**

Resources:

[How to Write An Activity](#)

[Allowable Use of Funds Guidance](#)

[Per Diem Lodging Rates](#) (please use when planning travel)

[Per Diem Meal Rates](#) (please use when planning travel)

## Charter Institute at Erskine Title II Plan Submission 2020–2021

The purpose of the Title II, Part A grant is:

- to increase student achievement consistent with challenging State academic standards,
- to improve the quality and effectiveness of teachers, principals and other school leaders,
- to increase the number of teachers, principals and other school leaders who are effective in improving student academic achievement in schools, and
- to provide low-income and minority student greater access to effective teachers, principals and other school leaders.

### District Set-Asides

After the receiving the Title II allocation from the SC Department of Education, the Institute has set aside a portion of funds at the district-level to provide for the below activities. These are activities that the Institute will fund.

• Coursework and Praxis testing fees (limited amount)

• Mentor teacher stipend

• Conference opportunities for teachers

• Building Leadership Capacity Program for aspiring charter school leaders

# Plan Submission

- When selecting Function and Object for your plan:
  - Be mindful of which code you select
    - Ex: 100 – Salaries: Only select if the person is a salaried employee, not contracted
- Function and Object codes can be changed BEFORE we submit to SCDE
  - Inaccurate Function and Object codes require an amendment once submitted and approved by SCDE

# Plan Submission

## Issues that may delay plan approval -

- Late plan submission
- No signatures on submission
- Comprehensive Needs Assessment lacks detail
- Expenditure activities do not tie back to Needs Assessment
- Expenditure activities are written with limited detail
- Narratives in plan for salaries do not match details in job description, contract, etc.

# Plan Submission

- Comprehensive Needs Assessments

## 7. Budget

### 1. Aligned to Needs Assessment

Ratios vary from the Needs Assessment ratios within the project- see two examples below.

█████ Employ 1 x 1.0 FTE teacher to reduce class size to provide more individual and small group academic instruction. This position will be an assigned █████ teacher. The current ratio is first grade is 25:1 and this additional position will reduce the ratio to 12:1. Expenditures include \$18,710.00 for salary (100% of salary).-This ratio varies from the ratio within the Needs Assessment for █████

█████: Employ 1 x 1.0 FTE additional teacher to reduce class size to provide more individual and small group academic instruction for █████. This reduces the 7th grade █████ ratio from 200:1 to 100:1. Expenditures include 100% of salary cost of \$44,200.00. This ratio varies from the ratio within the Needs Assessment for █████

+ Comment History

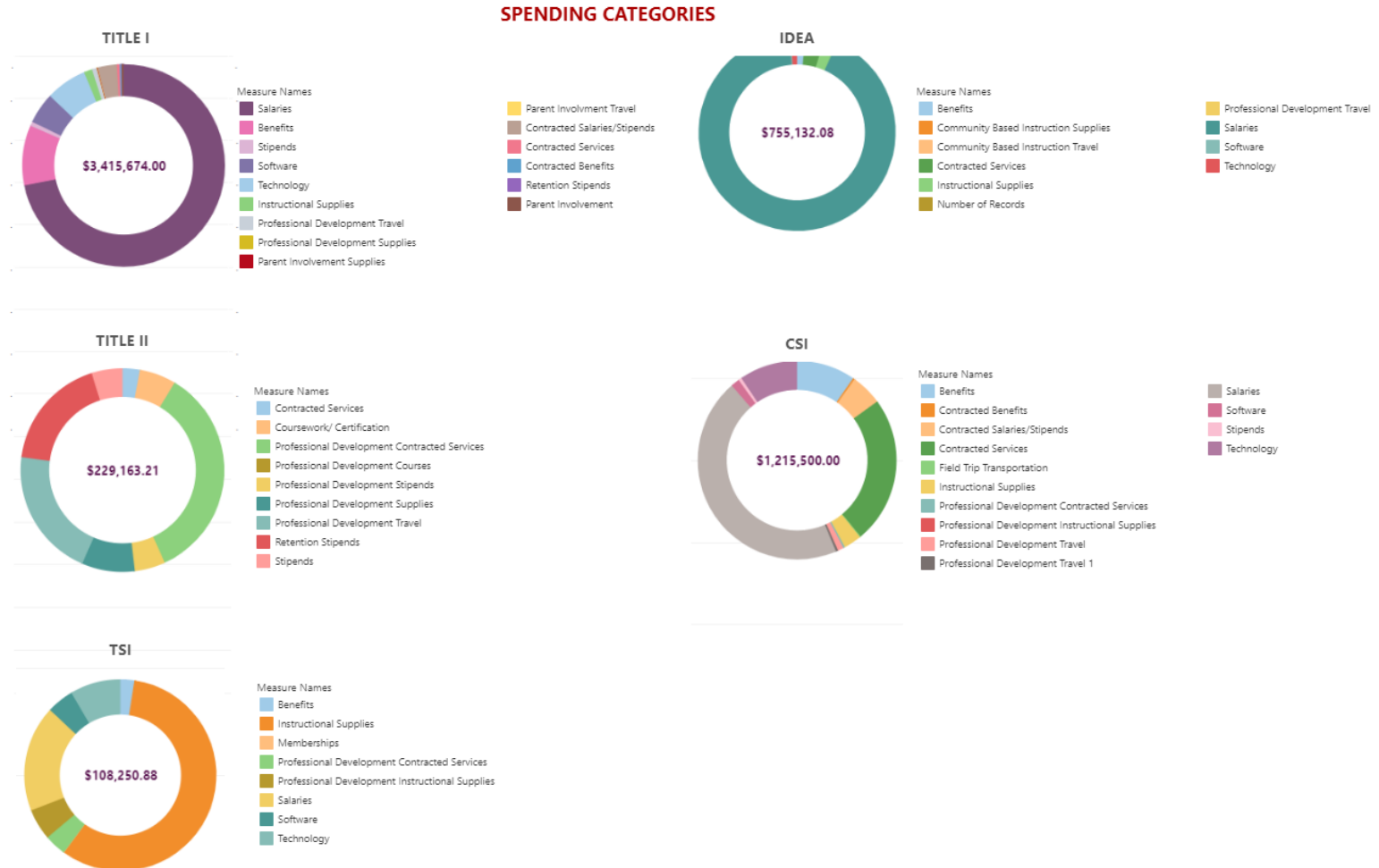
# Developing Plans

***Provide clear description.***

***Remember to include the WHO, WHAT, WHEN, WHERE and WHY. Justify your cost for the activity.***

Weak	Better
Provide professional development on Smart Technology and Study Island.	Provide professional development to teachers in an effort to improve academic performance in all subjects for students in grades K-7. Staff development will include MAP training, SMART board training, and collaborative planning. (7 days of training @ 1000 per day.)
Provide professional development to support Schoolwide academic programs by attending conferences and workshops.	Provide professional development for Principal and Curriculum Specialist to support Schoolwide academic programs by attending The Summer Leadership Institute (June 21-25, 2014). Expenditures may include lodging, registration, mileage, and meals.
Provide Professional Development for Title I schools only.	Provide Math Professional Development for Title I Schools only. The intense, small group and one-on-one assistance to all Title I math teachers will be conducted by Patty Smith. The training is tailored to the schools' and teachers' weaknesses as evidenced by SC Ready scores. Training will encourage more hands-on math activities. (Rate averages \$1000 per day for 18 days. 10 days of training during in-service and 8 days of training during the school year. \$110 for additional individual training session.)
Provide instructional materials in ELA/math for grades 6-8.	Provide instructional materials in ELA/math to support classroom instruction and small group instruction in grades 6-8. Expenditures may include classroom book sets at a rate of \$500 per set for 50 teachers, math kits @ \$475 each for 15 teachers, charts, paper, posters, tape, glue, staples, notebooks, timers, rulers, \$300 for additional ELA/math manipulatives for 50 teachers, etc. Additional items may include 50 print cartridges at a rate of \$30 each.

# Data Dashboard



2	The spreadsheet below will be used to provide feedback and make revisions to your school's IDEA plan prior to submitting to SCDE for approval. Your school's submitted plan has been entered into the spreadsheet (black font) and Institute feedback has been entered in blue font. Please respond to the feedback/comments/questions below.							
3	Function	Object	Activity	Quantity	Cost (per item)	Total Cost	Justification	
4	100 - Salaries	127-Learning	<p>FY20 salaries for 9 SPED teachers - <del>continuing as we have done in prior years</del>. Attached is a self-contained job description. I will request the SPED Dept provide me with the SPED resource teacher job description as well</p> <p>Institute Feedback</p> <ol style="list-style-type: none"> <li>1. Are all 9 SPED teachers full time (1.0 FTE)?</li> <li>2. Does this cover 100% of all 9 teachers salary?</li> <li>3. Please provide the 9 teacher names and if they are self-contained, resource, etc.</li> <li>4. Please submit the resource teacher job description via email to Celina Patton and Haley Perez.</li> </ol> <p>School Feedback</p> <ol style="list-style-type: none"> <li>1. All SPED teachers are full time 1.0 FTE</li> <li>2. This covers approximately 86% of the teachers salary which will be paid to them by 6/30. The remaining amount is mostly what will be paid over the summer through payrolls on 7/15,7/30 and 8/15 which is the remainder of their FY20 salary.</li> <li>3. [REDACTED]</li> <li>4. SPED Resource job description was emailed to Celina on 11/6/19 and to Haley on 10/31/19.</li> </ol> <p><b>Finalized Activity:</b> Provide salary for 9 x 1.0 FTE Special Education teacher salary.</p>	1	\$375,000.00	\$375,000.00	<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>	<p>Anticipate using all \$375,00 for salaries but should someone fulfill remaining teacher work days or need to take unpaid leave, may need to use a small portion for benefits.</p>

We will review plans, enter into Google Spreadsheet, give our feedback and send link to schools.





# Amendments

- Quarterly amendment periods-
  - September 15, 2020
  - January 15, 2021
  - April 15, 2021
- Amendment Due Date – Sept. 15
  - CARES and CSI/TSI
  - Submitted via LWS
  - Date differs for CARES Act for Brashier, Connections, and Lowcountry – Sept. 9

**CHARTER INSTITUTE AT ERSKINE**

**Office of Federal Programs Amendment Request Form**

<b>School Name:</b>		<b>Amendment # (for this program):</b>	1
<b>Name of Program:</b>	CSI Title I	<b>Fiscal Year:</b>	FY 21 (2020-2021)
<b>Name of School Program Director/Coordinator:</b>	Haley Perez	<b>Date Submitted:</b>	7/1/2020

*(See example on Sheet 2)*

<b>Current Activity Narrative:</b>	<b>Current Function Code:</b>	<b>Current Object Code:</b>	<b>Current Activity Cost:</b>	<b>New Activity Narrative:</b>	<b>New Function Code:</b>	<b>New Object Code:</b>	<b>New Activity Cost:</b>	<b>Justification:</b> <i>(Please also note if the data you are collecting to evaluate the activity will change)</i>
Funds will be spent to employ 1 x .50 FTE Instructional Coach (part-time) to provide support and staff development for ELA teachers in 6-8 grades.	100	100	\$15,000.00	Funds will be spent to employ 1 x 1.0 FTE Instructional Coach (full-time) to provide support and staff development for ELA and math teachers in 6-8 grades.	100	100	\$30,000.00	Based on the first quarter test scores, the planning committee requested for a 1.0 FTE Instructional Coach for both math and ELA. Data collection for this activity will change. Instead of only collecting test data from ELA, math scores will also be analyzed since this coach is now working with math teachers as well.
Funds will be spent for travel for 1 teacher to attend the American Montessori Society, 21-24 March 2019 in Washington, DC. Expenditures include \$230 registration, \$50 mileage, \$167 for lodging, and \$5.50 for meals, for a total of \$452.50.	224	300	\$452.50	Funds will be spent on virtual registration for 1 teacher to attend the American Montessori Society, 21-24 March 2019 in Washington, DC. Expenditures include \$250 virtual registration.	224	300	\$250.00	The teacher is no longer able to attend in person and will instead attend virtually. Data collection for this activity remains the same (observation/feedback of implementation of strategies learned).
NEW ACTIVITY				Funds will be spent to purchase book materials to support PD. PD sessions will be held focusing on PBL & will be held Jan-May for K-3 teachers.	224	400	\$202.50	Data collection will include teacher feedback on PD and PBL class observations

*\*All changes must represent allowable activities and uses of funding.*

<b>Signature of School Leader:</b>		<b>Signature of Program Coordinator:</b>	
<b>Date:</b>		<b>Date:</b>	

# Monthly Reimbursement Process

**Ashley Sturkie**  
Fiscal Coordinator

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# Monthly Reimbursements

- Approval memos list all required documents needed for reimbursement
- Monthly reimbursement deadlines
  - 2<sup>nd</sup> Friday each month
  - Submitted in Smart Fusion
  - Expenditures must include everything from prior month.
    - *Once deadline has passed, you cannot seek reimbursement for prior months.*

# Monthly Reimbursements

- If a Requisition is sent back in SmartFusion there will be detailed notes on what is needed for reimbursement.
  - Please carefully review items listed in approval memo prior to submitting in SmartFusion to ensure all required documents are included.
- The notification emails will be sent to the contact that each school selects.

# Smart Fusion Common Issues

- All documents not included
- Conferences – Only submit documents needed (ex: Agenda) and not the whole conference program
- Sole Source – Should be used for applicable circumstances only

# Smart Fusion Common Issues

- Timesheets not signed
- Purchase orders not being signed with 3 signatures
- Paying for services before the date of the invoice



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# Data Dashboard

Data Dashboard will be updated to reflect monthly reimbursements.



Title I is allocated based on poverty percentage for qualifying schools.



Title II is allocated to all schools based on number of students.

Measure Names  
■ \$ Spent  
■ \$ Unspent



IDEA is allocated based on prior year child count.



Title I CSI is allocated to schools on SCDE School Improvement.



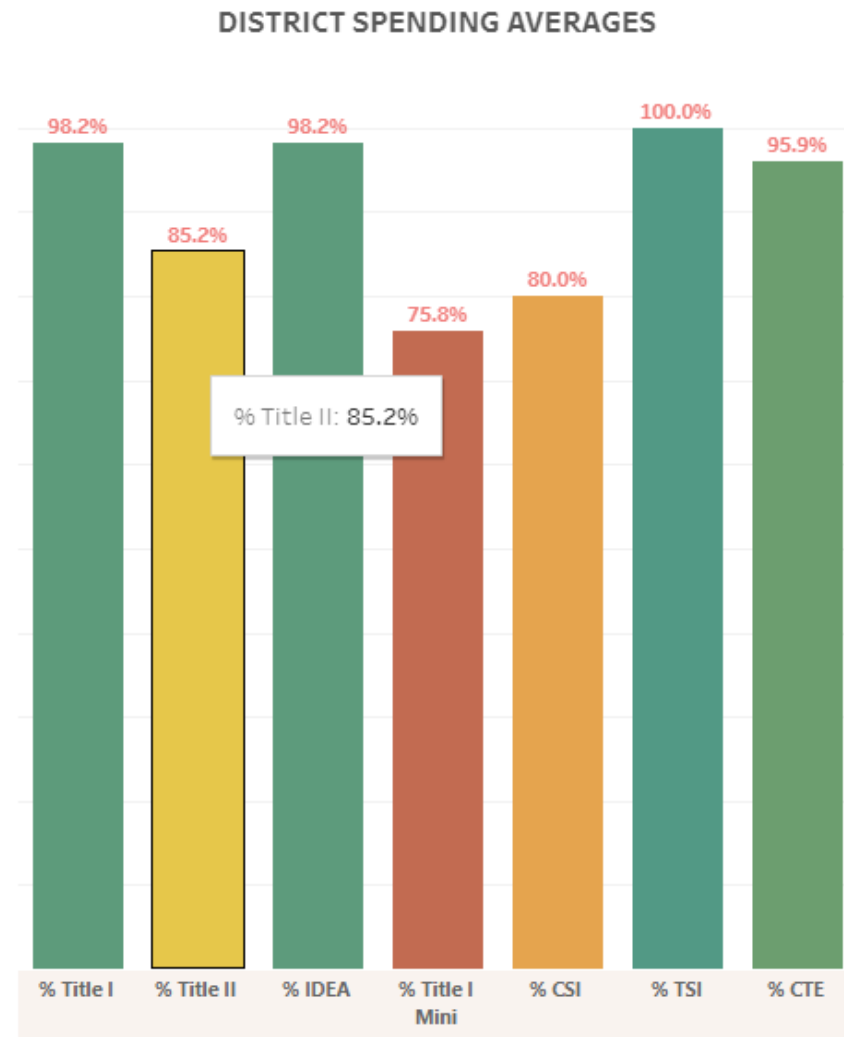
Title I TSI is allocated based on low performing subgroup.



CATE is allocated based on schools with qualifying program.



# Data Dashboard



# Federal Fund Employees

**Haley Perez**

Executive Director of Federal Programs

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# Federal Fund Employees

- Employees paid via federal funds require specific documentation
  - Title I, IDEA, CSI/TSI, CARES
- Requirements include Job Description, Contract/Agreement, Schedule, Salary Split, and Time & Effort



# Federal Fund Employees – Common Issues

- Job Description
  - Title in job description does not match title in plan
- Contracts/Agreements
  - Not for current year
  - Salary in agreement does not match salary submitted in plan
  - Contract/Agreement not signed

# Federal Fund Employees – Common Issues

- Schedule
  - Time does not match FTE/percentage in plan
  - Schedule does not provide detail
- Salary Split
  - Does not reflect entire annual salary
  - Funds not adjusted to reflect how employee is paid
  - Amounts do not calculate to total in plan or in contract/agreement
- Time and Effort
  - Dates do not reflect time worked
  - Title on time and effort does not reflect title in plan

# Schedules

- Must have daily information
- Cannot only list dates and times working in building. Ex: Monday 8am – 4pm
- Must reflect percentage in plan
- If it is for a teacher, the schedule can be the daily class schedule.

Ashley Sturkie

Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 am – 10: 00 am	1 <sup>st</sup> Grade intervention	1 <sup>st</sup> Grade intervention	1 <sup>st</sup> Grade intervention	1 <sup>st</sup> Grade intervention	1 <sup>st</sup> Grade intervention
10:00 am – 12:00 pm	2 <sup>nd</sup> Grade Intervention	2 <sup>nd</sup> Grade Intervention	2 <sup>nd</sup> Grade Intervention	2 <sup>nd</sup> Grade Intervention	2 <sup>nd</sup> Grade Intervention
12: 00 pm – 2:00 pm	3 <sup>rd</sup> Grade Intervention	3 <sup>rd</sup> Grade Intervention	3 <sup>rd</sup> Grade Intervention	3 <sup>rd</sup> Grade Intervention	3 <sup>rd</sup> Grade Intervention
2:00pm – 4:00 pm	4 <sup>th</sup> Grade Intervention	4 <sup>th</sup> Grade Intervention	4 <sup>th</sup> Grade Intervention	4 <sup>th</sup> Grade Intervention	4 <sup>th</sup> Grade Intervention

# Salary Split

- Only need to submit one for the ANNUAL amount.
- The total must match percentage in plan and on contract/agreement.
- The total salary must equal the total salary for the year.

Employee Name(s):		School Name:								
		John Does			Jane Smith			TOTAL		
		Hours	Rate	July20 - June21	Hours	Rate	July20 - June21	Hours	Rate	July20 - June21
Employee Wages, Taxes and Adjustments										
Gross Pay										
Salary Teacher-General				\$ 9,509.91			\$ 36,700.00			\$ 9,509.91
Salary Teacher - Title I				\$ 40,800.00			\$ 712.50			\$ 77,500.00
Hourly After-School					23.75	\$30	\$ 712.50	23.75		\$ 712.50
Total Gross Pay		0		\$ 50,309.91	23.75		\$ 37,412.50			\$ 87,722.41

*\*\*This amount should reflect what is being paid from general fund.*

*\*\*This amount should reflect what is being paid from federal funds.*

*\*\*This amount should reflect the total salary for the year.*

*\*\* This form should reflect TOTAL salary for the year, only be submitted with the total amount, and match the employee agreement and/or contract.*



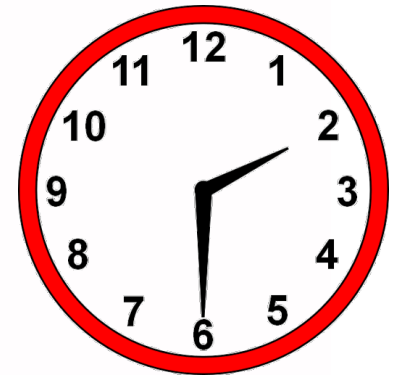
These should change depending on the funds the employee is paid from.





# Time and Effort

- Federal law requires all employees, including teachers, paraprofessionals, and other staff that are paid with federal funds to document the time and effort they spend within that program. The portion of the federally paid salary should be reflective of the time and effort the individual has put forth for that federal program.
- Required for all employees paid with federal programs
- Submitted in LWS
- A schedule must be provided for all federally-funded employees, regardless of the type of time and effort certification they complete



# Time and Effort

## Single Cost Objective

- Semi-Annual Certifications
  - Allowable for employees that are 100% funded by the program
  - Allowable for employees that are completing a job that can be covered 100% by the program
  - Complete twice per year (July-Dec and Jan-June) at the end of each semester
- This certification should also include documentation of time spent on the federal program (copy of daily planner, schedules, time sheets, daily logs, etc.).

**CERTIFICATION OF FULL-TIME EMPLOYMENT  
IN A TITLE I SCHOOLWIDE PROGRAM**

This is to certify that for the time period from \_\_\_\_\_, \_\_\_\_\_,  
month year  
to \_\_\_\_\_, \_\_\_\_\_, I have performed full-time equivalent job  
month year  
responsibilities for \_\_\_\_\_ School District solely  
supported by the \_\_\_\_\_ School Title I school-wide plan  
as defined by Title I, Elementary and Secondary Education Act (ESEA),  
which is treated as a single \_\_\_\_\_

**\*Signed by the employee and supervisor**

Signed by:  
(Staff Member) \_\_\_\_\_  
(Supervisor) \_\_\_\_\_  
(Date) \_\_\_\_\_

Note: This form must be completed semi-annually (twice a year) for a position  
solely intended to support a Title I school-wide plan.

# Time and Effort

## Multiple Cost Objective

- If the employee is paid from two or more funding sources but has a fixed schedule for activities.

School Name \_\_\_\_\_

**Personnel Activity Report / Time Certification**

An employee whose salary is split funded between two cost objectives (Title I and operating) must sign this form at the end of each month. Each employee should have his/her own form.

Employee name: \_\_\_\_\_

Reporting Period: \_\_\_\_\_ Fiscal Year: \_\_\_\_\_

Type of Schedule: \_\_\_ Daily \_\_\_ Weekly \_\_\_ Biweekly \_\_\_ Other: \_\_\_\_\_

Cost Objective	Program	Distribution of Time	# of Hours of Time
These are examples only			
Title I	Reading Recovery	40%	70
Title I	Direct Instruction	40%	70
IDEA	Resource teacher	20%	35
	<b>Total</b>	<b>100%</b>	<b>175</b>

This is to certify that I, \_\_\_\_\_ (print name), have worked \_\_\_\_\_ % (pro-rated Title I portion of salary) in a Title I appropriate position as a \_\_\_\_\_ (position) under the Title I cost objective.

I certify that I have firsthand knowledge that the above employee performed work consistent with the attached schedule and as distributed in the above percentages during the certification period.

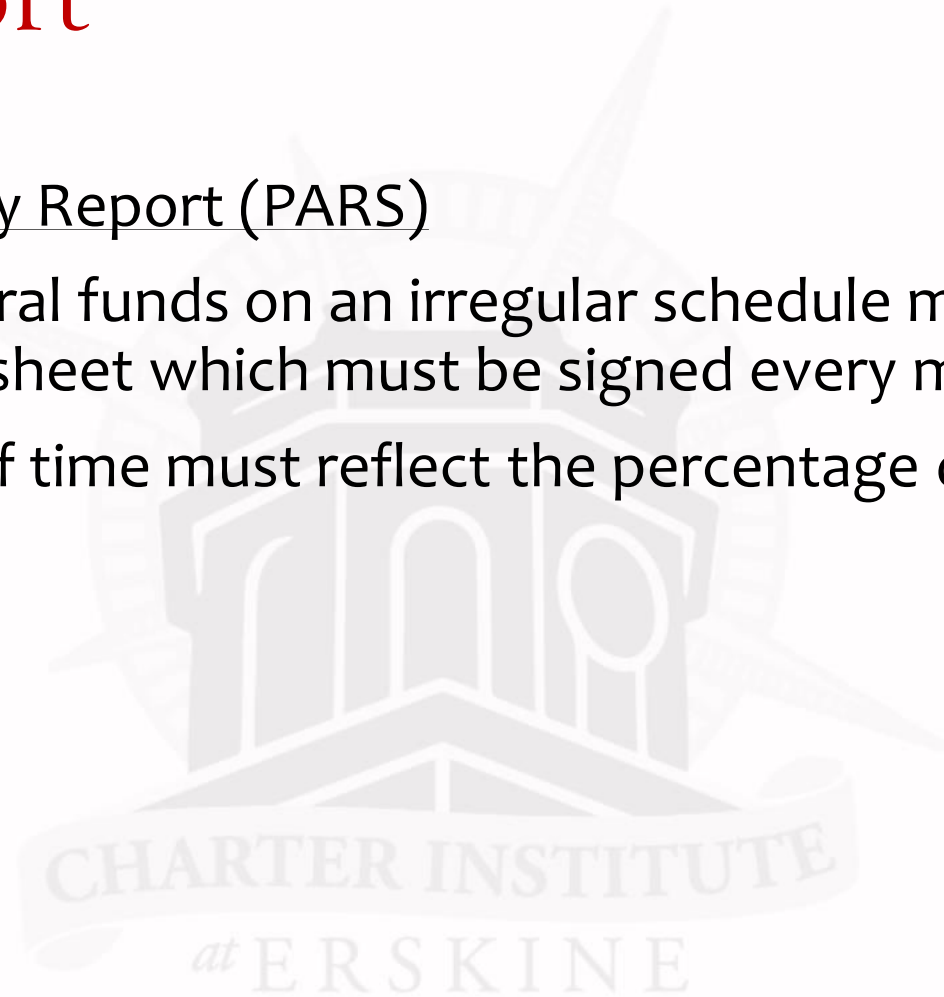
Principal \_\_\_\_\_ (Print Name)  
\_\_\_\_\_  
(Signature)

Date \_\_\_\_\_

# Time and Effort

## Daily Personnel Activity Report (PARS)

- Staff paid with federal funds on an irregular schedule must keep a time and effort log and time sheet which must be signed every month.
- Daily percentages of time must reflect the percentage of salary paid by the federal fund



# Federal Fund Employees – Keep in mind...

- School Website
- Power School
- PCS

All should match!





10 minute break

# Title II Program

Supporting Effective Instruction

**Haley Perez**

Executive Director of Federal Programs

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# Parents Right to Know

- At the beginning of each school year, a school that receives funds under this part shall notify the parents of each student attending any school receiving funds under this part that the parents may request, and the school will provide the parents on request (and in a timely manner), information regarding the professional qualifications of the student's classroom teacher.
  - Distribute Parent Right to Know letter to parents
  - Document any Right to Know requests from parents



# Parents Right to Know

- Must notify parents that they may request the following information regarding their child's teacher:
  - Whether the teacher has met the SC certification requirements for the grade level and subject area in which the teacher provides instruction
  - Whether the teacher is teaching under an emergency or other provisional status through which SC qualifications or certification criteria have been waived
  - The college major and any graduate certification or degree held by the teacher
  - Whether the student is provided services by paraprofessionals, and if so, their qualifications

# Parent Right to Know

- A sample/template is provided.

## Right to Know Professional Qualifications of Teachers and Paraprofessionals

Date: [Insert Month/Day/Year]

Dear Parents,

In compliance with the requirements of the Every Students Succeeds Act, the [School Name] would like to inform you that you may request information about the professional qualifications of your student's teacher(s) and/ or paraprofessional(s). The following information may be requested:

- Whether the student's teacher—
  - has met State qualification and licensing criteria for the grade levels and subject areas in which the teacher provides instruction;
  - is teaching under emergency or other provisional status through which State qualification or licensing criteria have been waived; and
  - the college major and any graduate certification or degree held by the teacher.
- Whether the student is provided services by paraprofessionals and, if so, their qualifications.

If you wish to request information concerning your child's teacher's and/ or paraprofessional's qualifications, some of this information is accessible through the South Carolina Department of Education's (SCDE) Educator Qualification Search, <https://ed.sc.gov/policy/federal-education-programs/esea-title-ii-part-a1/parents-right-to-know-requirement/educator-qualification-search/>

You may search for this information by entering the teacher's name directly or by accessing a listing of all teachers by district or school name. Only teachers currently employed in South Carolina's school districts are included in this listing. Information obtained through the Teacher Qualification Search Website is intended for informational use only and is not an official record.

If parents do not have access to the Internet or wish to receive additional information, please contact [Insert Title of Principal or Designee], at [Insert phone number]. The information will be provided to you within a reasonable period of time, normally within three weeks of receiving your request.

Sincerely,

[Insert Signature]

[Insert Printed Name]

[Insert Principal/Designee Title]

# Parent Right to Know

- Schools must notify parents in a format that is understandable and in a medium that will reach all parents (if possible, provide in a language the parents will understand)
- Ensure the notification includes the principal's contact information, the school name, and the date of notification.

# Parent Right to Know

- This requirement is for all schools
- Parent Right to Know letter is collected via LWS
- Due in LWS on September 18



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# Title II Allowability

- The purpose of the Title II, Part A grant is:
  - to increase student achievement consistent with challenging State academic standards,
  - to improve the quality and effectiveness of teachers, principals and other school leaders,
  - to increase the number of teachers, principals and other school leaders who are effective in improving student academic achievement in schools, and
  - to provide low-income and minority student greater access to effective teachers, principals and other school leaders.
- All Title II expenses must tie back to the purpose.

# Title II Allowability

- Initiatives to recruit and retain highly effective teachers
- Professional development to increase teacher knowledge and improve instruction in the classroom
- Professional development to improve the quality of instructional leadership teams, principals, and other school leaders
- Teacher advancement initiatives

# Title II Non-Allowable Expenses

- Food
- Instructional materials
- Supplies not directly tied to PD
- Evaluator training
- MAP testing and other benchmark testing
- Technology/equipment
- Recruitment giveaways with logo
- Any State requirements, such as Read to Succeed courses

# Title II Allowability – Keep in mind...

- Stipends
  - Must have an approved stipend policy
- Professional Development
  - If using Title II to fund PD, an agenda and sign-in sheet must be submitted



# Title II Allowability – Keep in mind...

- Supplies

- Title II funds can be used to purchase PD supplies that are reasonable and necessary to carry out the PD.
- **MAY** purchase professional learning books for a scheduled PD on a topic that aligns with the needs assessment
- **MAY NOT** purchase books to stock a professional learning reference library
- **MAY** purchase 5 graphing calculators for 5 teachers to use during PD on math content
- **MAY NOT** purchase a classroom set of graphing calculators

# Title II Allowability – Keep in mind...

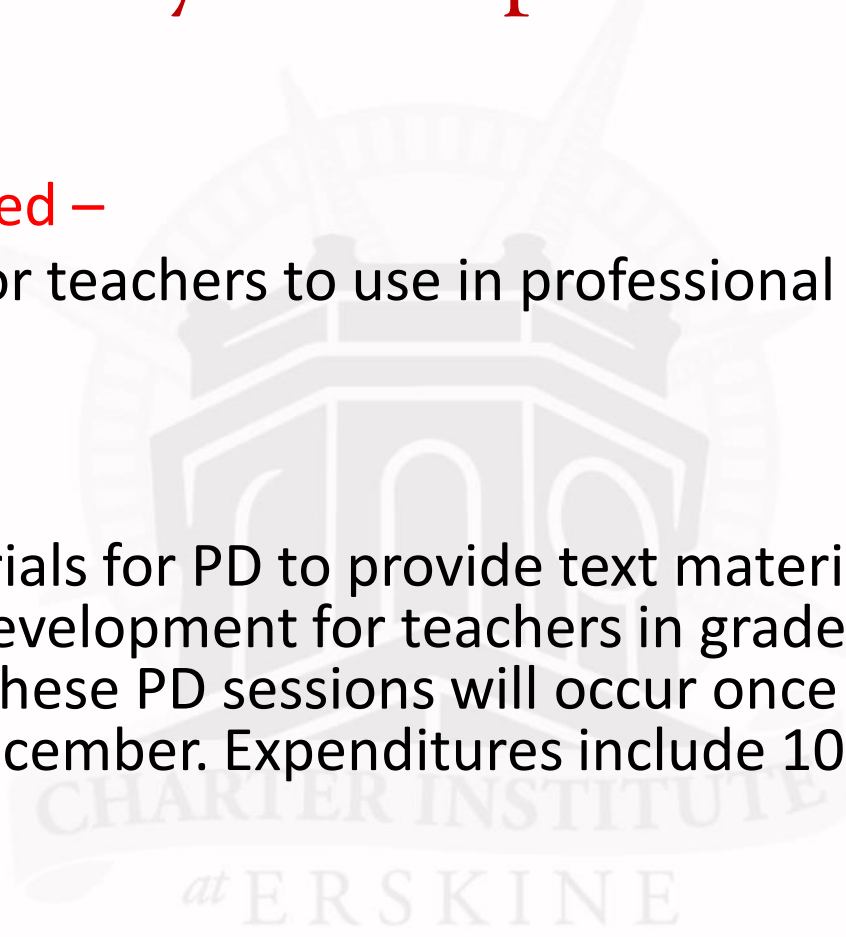
- PD Supplies

- Activity not approved –

Purchase PD books for teachers to use in professional development sessions.

- Activity approved -

Purchase book materials for PD to provide text materials for a year-round professional development for teachers in grades K-2 to improve literacy instruction. These PD sessions will occur once a week for 1 hour each from August-December. Expenditures include 10 copies of “Name of Book” for \$XXX.



# Title I

## Programmatic Compliance

**Sarah Shealy**

Compliance Coordinator

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# Title I

## What is the purpose of Title I?

- To provide an enriched and accelerated educational program;
- To promote schoolwide reform through schoolwide programs or through additional services that increase the amount and quality of instructional time;
- To significantly upgrading the quality of instruction by providing staff in participating schools with substantial opportunities for professional development; and
- To afford parents meaningful opportunities to participate in the education of their children at home and at school.

# Principal Attestation Letter

- The Principal Attestation Letter must be signed by the principal.
- The letter must be on file at the school.
- The principal must submit an attachment outlining the details if any teachers or paraprofessionals do not meet the requirements of the letter.

*A template is provided in LWS and the Title I Checklist*

## Principal's Attestation Regarding Teachers and Paraprofessionals For Title I, Part A

School Name: \_\_\_\_\_

I attest, as principal of the above named school, that the following is true:

- All teachers teaching in a program supported with Title I funds are properly certified for their teaching assignment as required by the South Carolina Department of Education (SCDE) Required Credentials regulation.
- All paraprofessionals working in a program supported with Title I funds shall have:
  - completed at least 2 years of study at an institution of higher education;
  - obtained an associate's (or higher) degree; or
  - met a rigorous standard of quality and can demonstrate, through a formal State or local academic assessment knowledge of, and the ability to assist in instructing, reading, writing and mathematics; or knowledge of, and the ability to assist in instructing, reading readiness, writing readiness and mathematics readiness, as appropriate
  - a secondary school diploma (or its recognized equivalent)

Any teachers or paraprofessionals who do not meet the above requirements are listed in an attachment to this page along with details regarding the process or program to rectify their situation.

Signed: \_\_\_\_\_

Name and title: \_\_\_\_\_  
(printed)

Date: \_\_\_\_\_

# Paraprofessionals

All instructional paraprofessionals in Title I schools must complete at least one of the following three requirements:

- At least two years of study (60 semester hours) at an accredited institution of higher education; or
- An associate's degree (or higher); or
- An approved state or local academic assessment that measures the paraprofessional's knowledge of and ability to assist in instruction of the following subjects at the appropriate level:



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# Paraprofessionals

- Submit list of paraprofessionals/instructional aides
  - Include qualification (transcript, test score, etc.)
- Submit evidence paraprofessional works under supervision of teacher
  - Lesson plans with assignment noted, work log, or documentation of responsibilities
- All paraprofessional documentation collected via LWS

# Planning Meeting

- The purpose of the planning meeting is to plan and develop the school Title I plan based on the needs of the school. The school must consider strategies to close the achievement gaps within the school.
- The planning meeting must be held prior to submission of the Title I plan.
- The school must select a diverse school planning team consisting of staff, administrators, parents, community members, and students at the high school level.



# Planning Meeting

## Preparation

- The school must have a meeting notice to share with parents and stakeholders to invite them to participate in the meeting.
- A diverse school planning team must be invited. This must consist of staff, administrators, parents, community members, & students (at high school level).
- The school must send out the draft Parent and Family Engagement Policy and draft School-Parent Compact prior to the Planning Meeting to request feedback.
  - *Any feedback collected will be used during the Planning Meeting for revising the documents.*
- The school must have a written procedure for processing parent suggestions shared at the meeting.

# Planning Meeting

## Agenda

- Evaluation of previous year's parent involvement program and activities
- Planning of future parent involvement program and activities
- Review and revision of Parent and Family Engagement Policy
- Review and revision of School-Parent Compact
- Review of previous year's Title I plan and Annual Evaluation
- Discussion of Comprehensive Needs Assessment to identify and prioritize needs
- Planning of current year Title I plan and implementation

# Planning Meeting

## Required Documentation

- Meeting announcements/notices/invitations
- Agenda
- Sign-in sheets with role
- Minutes
- Written procedure for processing parent suggestions

*This checklist is provided in LWS and the Title I Checklist*

### Planning Meeting Checklist

Title I schools are required to retain documentation which shows that parents of children receiving services under Title I were involved in the decisions regarding how the funds would be used. The school must also develop jointly with, and agreed upon with, and distribute to parents a written parent involvement policy and school-parent compact. A Planning Meeting must be held prior to the Title I plan being approved. Please use the checklist below to be sure your school meets all requirements for the upcoming planning meeting.

REQUIRED Items for Planning Meeting	Yes	No
Do you have a meeting notice to share with parents and stakeholders to invite them to participate in the meeting?	<input type="checkbox"/>	<input type="checkbox"/>
Did you select a diverse school planning team to invite? (This must consist of staff, administrators, parents, community members, students (at high school level).	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a sign-in sheet so that all meeting attendees can sign in?	<input type="checkbox"/>	<input type="checkbox"/>
Have you assigned someone to take minutes during the meeting?	<input type="checkbox"/>	<input type="checkbox"/>
Does your agenda have all of the below items included- 1. Evaluation of previous year's parent involvement program and activities* 2. Planning of future parent involvement program and activities 3. Review and revision of Parent and Family Engagement Policy 4. Review and revision of School-Parent Compact 5. Review of previous year's Title I plan and Annual Evaluation* 6. Discussion of Comprehensive Needs Assessment to identify and prioritize needs 7. Revision of current year Title I plan and implementation *Only for schools that were Title I in prior year	<input type="checkbox"/>	<input type="checkbox"/>
Did you share the original/draft Parent and Family Engagement Policy with stakeholders prior to the meeting and collect feedback to discuss potential revisions during the meeting?	<input type="checkbox"/>	<input type="checkbox"/>
Did you share the original/draft School-Parent Compact with stakeholders prior to the meeting and collect feedback to discuss potential revisions during the meeting?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have copies of the original/draft Parent and Family Engagement Policy to share with meeting attendees when the team discusses potential revisions during the meeting?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have copies of the original/draft School-Parent Compact to share with meeting attendees when the team discusses potential revisions during the meeting?	<input type="checkbox"/>	<input type="checkbox"/>
Are meetings related to Title I being scheduled to offer various times/days to increase involvement?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a written procedure for processing parent suggestions received during or after the meeting?	<input type="checkbox"/>	<input type="checkbox"/>

I certify that I have reviewed all of the above compliance requirements for the school's Title I planning meeting.

\_\_\_\_\_  
Title I School Coordinator

\_\_\_\_\_  
Date

# Planning Meeting

Who should attend the meeting?

## **Title I Annual Meeting and Planning Meeting Differences**

### **Title I Planning Meeting:**

The school should select a school planning teams consisting of the following members:

- School staff,
- Administrators,
- Parents,
- Community members,
- Technical assistance providers,
- and, at the high school level, students.

The team will meet before the end of school year plan to develop their school Title I Plan based on the needs of the schools. The school should consider strategies that could close the achievement gaps at the school.

### **Title I Annual Meeting:**

One requirement of the Elementary and Secondary Education Act (ESEA) is the Title I Annual Parent Meeting. Each year, schools receiving Title I, Part A, funds are required to host a meeting

# Annual Meeting

In order to keep parents informed, schools must invite to this meeting all parents of children in a Title I school.

In a school-wide school, all parents would be invited to attend, and in a targeted assistance school, parents of children receiving Title I services would be invited.

# Annual Meeting

## Agenda

- The school's participation in Title I
- The requirements of Title I
- The parents' right to be involved in their child's education
- Parent and Family Engagement Policy
- School-Parent Compact
- Title I Plan
- A description and explanation of the school's curriculum
- Information on the forms of academic assessment used to measure student progress
- Information on the proficiency levels students are expected to meet

# Annual Meeting

## What to include in the meeting:

### Title I Annual Meeting:

One requirement of the Elementary and Secondary Education Act (ESEA) is the Title I Annual Parent Meeting. Each year, schools receiving Title I, Part A funds are required to host a meeting for parents to explain the Title I program and how parents can be involved. At this meeting, the following issues must be addressed:

- Explain whether the school participates in a schoolwide or targeted assistance program.
- Explain the requirements of a schoolwide or targeted assistance program.
- Explain what participation in Title I means for the school and include-
  - \* A description and explanation of the school's curriculum.
  - \* Information on the forms of academic assessment used to measure student progress.
  - \* Information on the proficiency levels students are expected to meet.
- Explain the district Parental Involvement Policy, the school Parental Involvement Policy, and the school School-Parent Compact. (Note that each Title I school must have a **site specific** Parental Involvement Policy and School-Parent Compact. This is not the same as the district Parental Involvement Policy.)
- Explain the rights of parents to be involved in the school's programs and provide ways to do so.
- Explain that parents have the right to request opportunities for regular meetings for parents to formulate suggestions and to participate, as appropriate, in decisions about the education of their children.

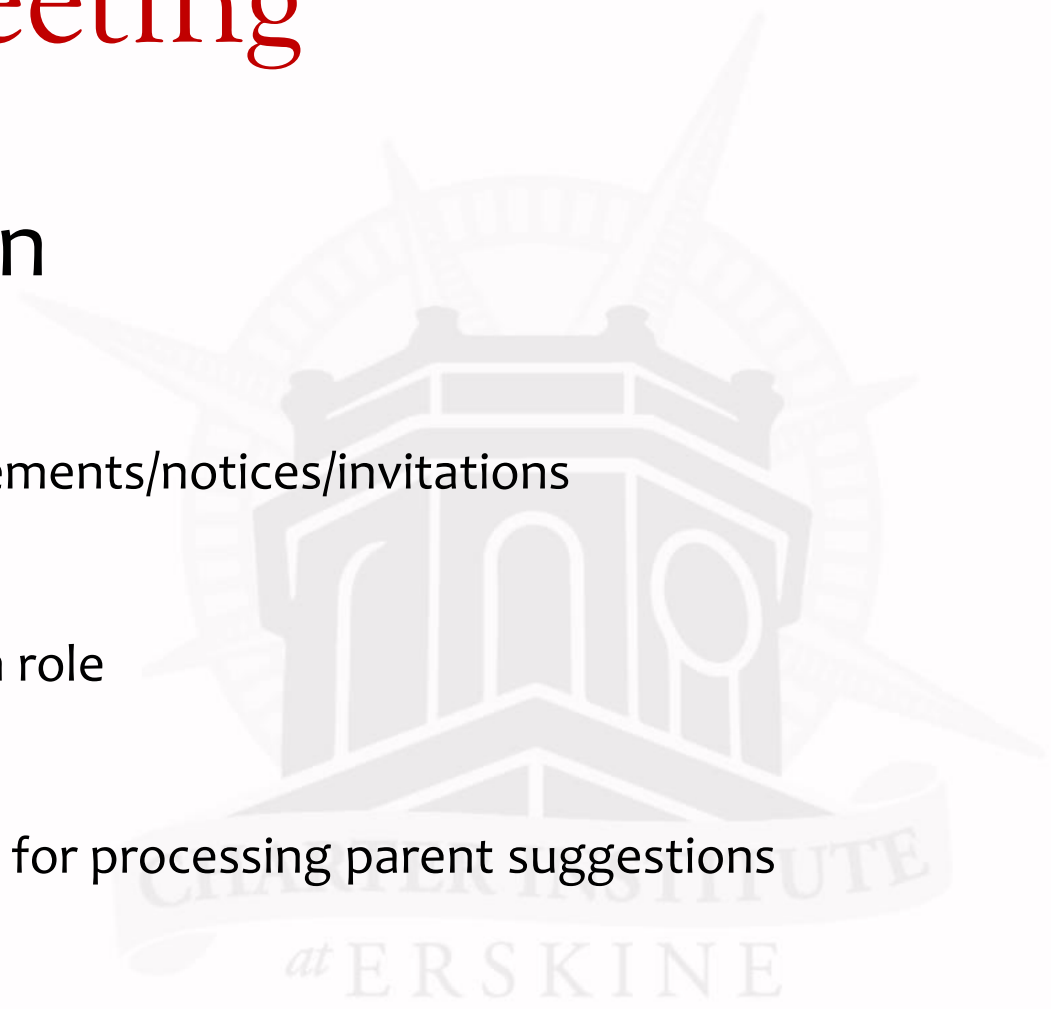
In order to keep parents informed, schools must invite to this meeting all parents of children participating in Title I, Part A programs. In a schoolwide school, all parents would be invited to attend, and in a targeted assistance school, parents of children receiving Title I services would be invited. Schools must also offer a flexible number of additional meetings, such as in the morning or evening so that as many parents as possible can attend.



# Annual Meeting

## Documentation

- Meeting announcements/notices/invitations
- Agenda
- Sign-in sheets with role
- Minutes
- Written procedure for processing parent suggestions





# Distribution of Title I Plan

The school must submit written proof that the school Title I plan has been shared with parents.

The school must also have a written procedure for processing parent suggestions related to the Title I Plan, as parents must be given the opportunity to provide comments on the plan if they feel it to be unsatisfactory.

# Annual Evaluation

At the end of each school year, Title I schools are required to evaluate the effectiveness of the Title I program.

The school must determine whether the program has been effective in increasing the achievement of students in meeting South Carolina's academic standards, particularly for those students who had been furthest from achieving the standards.

The school must use this evaluation to revise the plan, as necessary, based on the results of the evaluation to ensure continuous improvement of students.

# Parent and Family Involvement

How do I involve parents and family members in our school?

Families are more likely to become involved when they:

- Understand that they should be involved
- Feel capable of making a contribution
- Feel invited by the school



# Parent and Family Involvement

## Parent and Family Engagement Policy

*Schools that receive Title I, Part A funds must develop jointly with the parents of children participating in Title I services a written parent and family engagement policy that describes how the school will carry out the parent and family engagement requirements set forth in ESSA (section 116 (a)(2)).*

The policy must be reviewed annually and revised as needed.

- Original parent involvement policy should be distributed to request input (note date)
- Re-distribute to parents once policy has been revised (note date)

# Parent and Family Involvement

## Parent and Family Engagement Policy

*A sample policy and this checklist is provided in LWS and the Title I Checklist*

JULY 2017

### Title I School Parent & Family Engagement Policy Self-Checklist

LEA Name: \_\_\_\_\_ School Name: \_\_\_\_\_

Each school that receives Title I funds is required to develop a written parent and family engagement policy that describes the means for carrying out the requirements of Section 1116 of the Every Student Succeeds Act (ESSA). The School must ensure that information related to school, parent and family engagement programs, meetings, and other activities are sent to the parents and families of Title I children in a format and in a language the parents can understand.

#### The policy must be

- Developed jointly with and agreed upon by parents of Title I children;
- Written in an understandable format and provided in a language parents can understand;
- Distributed to all parents of Title I children; and
- Made available to the local community and updated periodically to meet the changing needs of parents and the school.

CHECKLIST OF REQUIRED COMPONENTS	YES	NO
<b>Policy Involvement</b>		
1) The Policy describes how parents will be involved in an ongoing and timely way in the planning, review, and improvement of the school's Parent and Family Engagement Policy.		
2) The Policy states that an annual meeting will be held to inform parents of the school's participation in the Title I program and to explain the requirements of the program and their right to be involved.		
3) The Policy states that parent meetings, including parent conferences, will be held at different times during the day.		
4) The Policy states that Title I funds may be used to pay reasonable and necessary expenses associated with parent involvement activities, including transportation, childcare, or home visit expenses to enable parents to participate in school-related meetings and training sessions.		
5) The Policy describes how parents will be involved in the planning, review, and improvement of the school's Title I program.		
6) The Policy describes how the school involves parents in the joint development of the Schoolwide Program Plan under Section 1114. <i>(Applies only to Title I schools operating a Schoolwide Program.)</i>		
7) The Policy describes how the school will provide parents of participating children with timely information about the Title I program.		
8) The Policy describes how the school will provide parents of participating children with a description and explanation of the curriculum in use at the school, the forms of academic assessment used to measure student progress, and the achievement levels of the challenging State academic standards.		
9) The Policy states that the school will provide, if requested by parents, opportunities for regular meetings to formulate suggestions and to participate, as appropriate, in decisions relating to the education of their children, and will respond to any such suggestions within a designated time frame.		

# Parent and Family Involvement

## School Parent Compact

The school-parent compact is a written agreement between teachers and parents. It is a document that clarifies what families and schools can do to help children reach high academic standards. Every school receiving Title I funds must develop a compact.

The compact must be reviewed annually and revised as needed.

- Original compact should be distributed to request input (note date)
- Re-distribute to parents once compact has been revised (note date)

# Parent and Family Involvement

## School Parent Compact

### Must Include:

- Parent-teacher conferences
- Frequent reports to parents on their child's progress
- Reasonable access to staff
- Opportunities to volunteer
- Two-way, meaningful communication in a language that family members can understand

# Parent and Family Involvement

## School Parent Compact

*XYZ Elementary School*  
*(School logo if available)*  
*School-Parent Compact*

The XYZ Elementary School learning community of teachers, support staff, administrators, and families, have written this compact to outline how the entire school staff and students will share the responsibility for improved student academic achievement and the means by which the school and parents will build and develop a partnership to help children achieve the State's high standards.

### Our School's Responsibilities

XYZ Elementary School administrators, teachers and support staff will:

1. Provide high-quality curriculum and instruction in a supportive and effective learning environment that enables children to meet the State's student academic achievement standards as follows:
  - Provide targeted academic and behavioral supports to students ensuring all subgroups of students meet their learning targets
  - Ensure a safe environment conducive to learning
  - Progress monitoring with formative assessments are used for all students to ensure all students make at least a year's growth in Reading and Math
  - Curriculum is aligned to State Academic Content Standards
  - Enrichment activities are provided to enhance and support higher - level learning
2. Hold parent-teacher conferences in the first nine weeks each year during which this compact will be discussed as it relates to the individual child's achievement. Specifically, those conferences will be held:
  - Scheduled conferences are held   (date)  . Parents and teachers may also schedule conferences as needed throughout the school year.
3. Provide parents with frequent reports on their children's progress. Specifically, the school will provide reports as follows:
  - Interim Reports are sent home for parents to review four times a year, mid-quarter. Parents are invited to ask questions about their child's report.
  - Report cards are sent home quarterly. Parents are invited to contact their child's teacher with questions.
4. Provide parents reasonable access to staff. Specifically, staff will be available for consultation with parents as follows:
  - Phone and voicemail
  - E-mail
  - Written notes in child's agenda (daily assignment log)
  - One scheduled conference a year and additional conferences as requested by the parent or teacher.
5. Provide parents opportunities to support their child's education and the education of all XYZ Elementary School students by participating in XYZ Elementary School as follows:
  - Join children for lunch
  - Chaperone field trips
  - Observe classrooms
  - Serving on the PTO
  - Volunteering as a tutor, mentor or activity leader
  - Assist in an area of the school such as our children's classroom, library and playground
  - Attend school events such as Open House, performances, field day, etc.
  - Help to review Title I plans and compacts
  - Participate on XYZ County School District committees

Principal's Signature: \_\_\_\_\_ Date \_\_\_\_\_

Teacher's Signature: \_\_\_\_\_ Date \_\_\_\_\_

*A sample is provided in LWS and the Title I Checklist*



# Parent and Family Involvement

## Parent Involvement Activities

At the end of each school year, Title I schools are required to submit a list of all parent and family engagement events that were held throughout the school year.

The school should retain a copy of all announcements, sign-in sheets, agendas, minutes, etc. for these events throughout the year.

# Parent and Family Involvement

## How can we complete these requirements safely with Covid-19?

- Host online meetings (Facebook Live, Zoom, GoTo, Skype, Google, or other online platforms)
  - Tip: Record virtual meetings, and share via social media, school website, and emails.
    - This will help ensure that all members of the school have equal access to the meeting information.
    - Tip: Revise the Parent and Family Engagement Policy and School-Parent Compact to include virtual meetings.
      - Families will appreciate the clear view of what family engagement will look like this year.
- Conduct conference calls with families
- Seek input through online surveys sent to families (via email, website, media posts, google classroom, etc.)
  - Tip: Follow up each family engagement activity with a survey. Families may not feel comfortable speaking up in public, so it is important to provide multiple ways to communicate, as well as specific points of contact.

# Parent and Family Involvement

## How to document in person or virtual meetings and events:

- Remember that the Title I Planning Meeting, Title I Annual Meeting, and other Title I family events must be documented with the following:
  - Invitation or Announcement of Meeting
    - Ensure that documentation is maintained showing that all families have been contacted and have had the opportunity to participate and provide feedback
    - Tips: Save a pdf of any physical item that was sent home or posted/printed, Save a pdf of any emails showing the recipients, Take a screenshot of any digital meeting announcement (Facebook Event, Website post, or other digital media post)
  - Meeting Agenda
    - Tips: Save a pdf of the physical item and/or screenshot of the digital item
  - Presentation Materials
    - Save copies of all items presented at the meeting whether it be a handout, slideshow, or others
      - Tips: Save a pdf of the physical item and/or pdf/screenshot of digital items

# Parent and Family Involvement

## How to document in person or virtual meetings and events:

- Meeting Sign In or List of Participants
  - Remember that it is best to list whether a participant is a teacher, staff member, parent, student, etc.
    - Tips: Scan and save a pdf of any physical sign in sheet, Screenshot the participant list of a virtual meeting. A document can be created with a list of names and relation to the school (parent, student, faculty, staff) to support the screen shot as needed.
- Meeting Minutes
  - Tips: Save a pdf of the meeting minutes with details about what is discussed
- It is important to document each meeting through recordings, screen shots, surveys, or other. Be sure to clearly label all documentation with the meeting title, date, method it was held, and that it belongs in the 2020-2021 school year.

# Parent and Family Involvement

## How can your school spend funds budgeted for parent and family engagement activities?

- Distance learning and virtual meetings require a unique partnership between the school and family. There are many possible uses for family engagement using Title I, Part A funds. It is critical to connect learners and their families to what is going on in the classroom to ensure that each child has what he or she needs. Some examples of allowable uses of these funds include:
  - Web-based parent communication platforms/materials
  - Academic materials for at-home learning kits
  - Stipends for school staff to lead and attend family engagement activities outside of normal school hours

# We're Here to Support You!

Please reach out to the Office of Federal Programs with any questions or concerns.

Haley Perez- Executive Director of Federal Programs  
[FederalProgramsED@erskinecharters.org](mailto:FederalProgramsED@erskinecharters.org)

Ashley Sturkie – Fiscal Coordinator  
[fiscalcoord@erskinecharters.org](mailto:fiscalcoord@erskinecharters.org)

Sarah Shealy – Compliance Coordinator  
[compliancecoordinator@erskinecharters.org](mailto:compliancecoordinator@erskinecharters.org)



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